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Supplier Registration

Background Information	The following manual was created to assist you in the process of registering as a prospective supplier with the Arizona State Procurement Office (AzSPO) Spirit Automated Procurement System (SPIRIT).

Once you have completed this initial registration you will be able to return to update any information necessary, with the exception of your company name or Federal Employer ID/Social Security number. If you need to change your company's name or tax identification number please contact the Spirit Administrator. |
| Reference Materials | Reference materials for this topic include the following:

- Training simulations for registration at http://www.azspo.az.gov/ and follow the SPIRIT link

- Website: http://www.azspo.az.gov/ from there follow the SPIRIT link |
| Learning Objectives | - The supplier will be able to successfully register as a potential supplier in the Arizona State Procurement Office (AzSPO) Automated Procurement System (SPIRIT)

Specifically, the Suppliers will be able to

recall and apply various techniques to research and identify commodity codes based on numeric and alpha descriptions.

understand the process to delete a commodity code.

identify the Administrator's rights in maintaining their company's supplier registration file.

determine and input the appropriate information needed to complete the application. |

Before You
Begin

Before beginning the registration process consider the following required information:

- Your company's Federal Employer ID/Social Security Number and Arizona Sales Tax number.

- Realize that you will be considered the Administrator for your company's supplier profile. This duty may be delegated to someone else if necessary once you have completed registration.

- You will be asked for various addresses of your company. A main, "Remit To" and "Purchase Order" address. If these are the same, a checkbox is available to indicate that the information for the additional address is the same. If you are unsure of the addresses you may return to enter them once registration is complete.

NOW FROM THE BEGINNING ... .
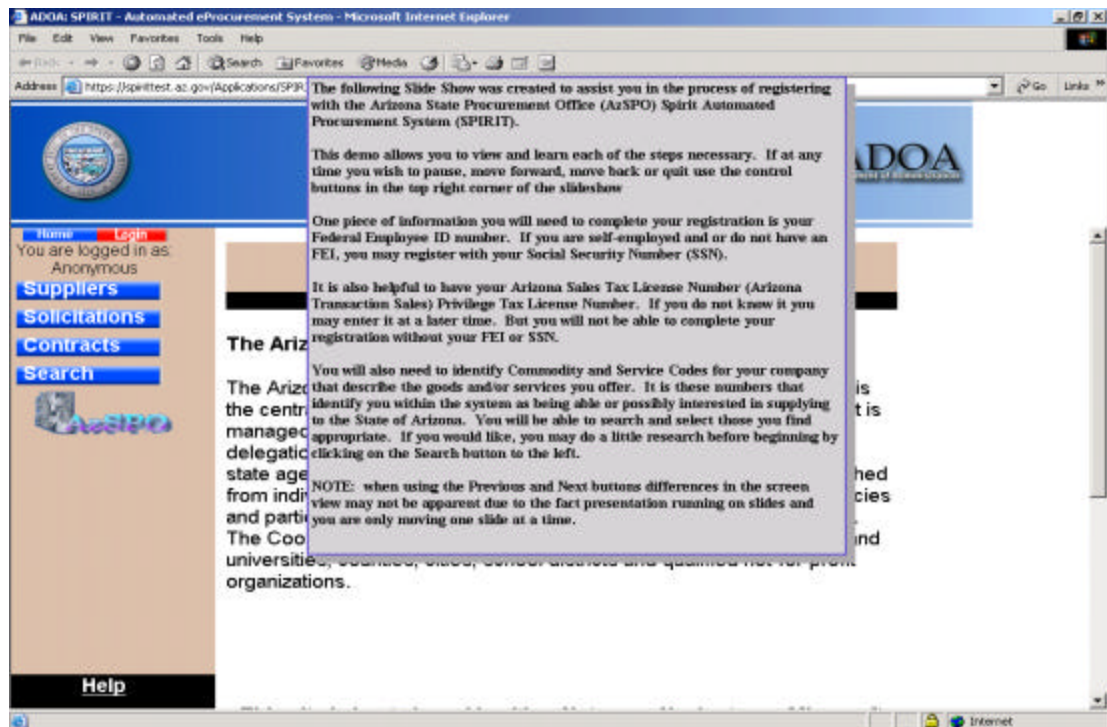
Click on the **Suppliers** from the menu options on the left

From the sub menu that opens after clicking on Suppliers, Click on **Register**

The page that follows contains a basic introduction to the SPIRIT system and the Arizona State Procurement Office.

You will click **OK** at the bottom of the screen to begin the registration process or click Cancel to abort the process.

Supplier Registration
New Registration
Page loaded on 08/04/2003 at 10:09:51 AM.

● = Required Field

General Information ❓
● Organization Name: My Company
● Federal Tax Id: ____ Arizona Sales Tax License Number: ____
● Federal Tax Id Type: ⦿ Federal Employer's Identification Number (FEI)
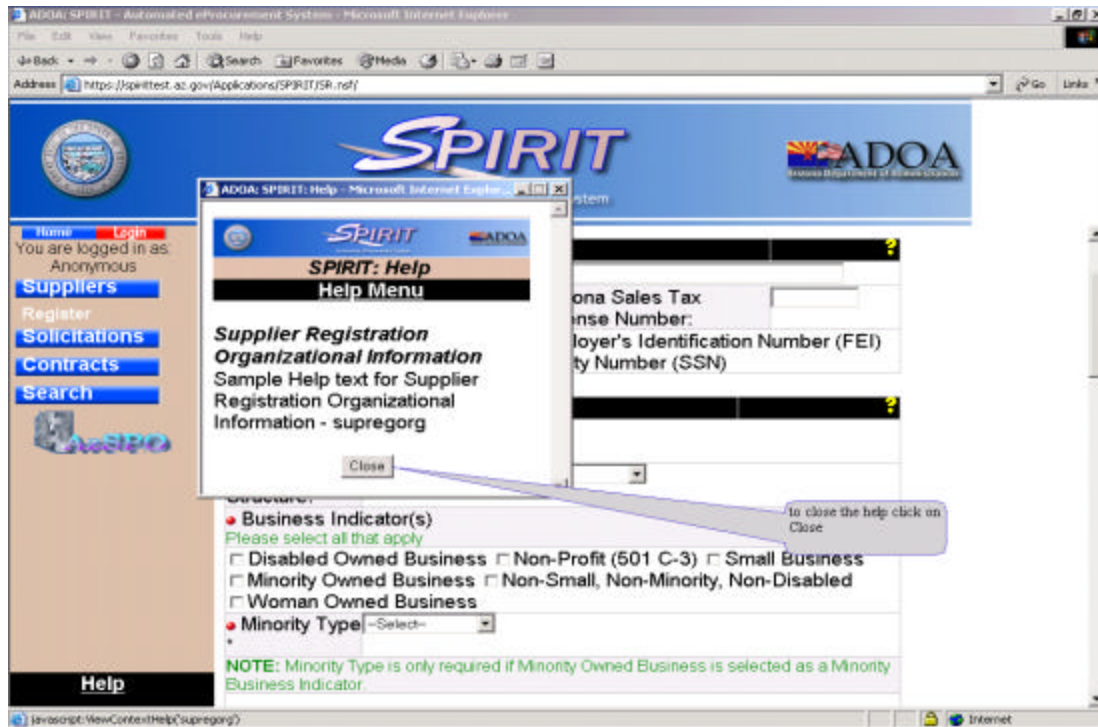 ○ Social Security Number (SSN)

Enter your Company Name in the Organization Name field

Enter your Company's Federal Employer Tax ID in the Federal Tax ID field

If you are self-employed or do not have an FEI, you may register using your Social Security Number (SSN) in the Federal Tax ID field – **NOTE**: Be sure to select the Federal Tax ID Type radio button for Social Security Number if you use your SSN.

For additional information regarding the Arizona Transaction (Sales) Privilege Tax License Number or Federal Employer ID visit the Arizona Department of Revenue at ***http://www.revenue.state.az.us/*** or the Internal Revenue Service at ***http://www.irs.gov/***

NOTE: Clicking on any ❓ "Help Icon" while in the Spirit Application will open the help window with information specific to the area. See screen shot on the next page.

To close the help window click on Close or click on the window X.

Continuing on ....

Click on the Business Type drop down menu arrow [arrow icon] in the Organization Information section. You will need to select a business type.

Click on the Organization Type drop down menu arrow [▼] in the Organization Information section. You will need to select an Organization Type. Select the "Organizational Structure" type that best describes your company's structure. See below

If you select Minority Owned, you will need to select the minority type from the Minority Type drop down menu. A definition for Small Business is provided.

Definition

> **Small Business** definition: Pursuant to A.R.S. 41-1001(14) A "small business" means a concern, including its affiliates, which is independently owned and operated, which is not dominant in its field and which employs fewer than one hundred full-time employees OR which has gross annual receipts of less than four million dollars in its last fiscal year.

Type in your DBE Certification if not applicable, leave blank. See below

DBE Certification		Government Agency	

Definition

DBE Certification

The city of Phoenix has a program that certifies minority-and woman-owned and small businesses for participation in special city incentive procurement and contracting programs. The city also has been contracted by Maricopa County to provide certification services for minority-and woman-owned firms interested in business opportunities with the county. If your company has been certified through this program enter the certification here.

The Government Agency field is for the State of Arizona agencies use only.

□ Statewide
□ Apache □ Coconino □ Graham □ La Paz □ Mohave □ Pima □ Santa Cruz □ Yuma
□ Cochise □ Gila □ Greenlee □ Maricopa □ Navajo □ Pinal □ Yavapai

Select the geographic area(s) by county that you wish to offer services/products in by placing a checkmark in the appropriate box(es). You may select multiple counties or select Statewide to do business anywhere in the state.

Note

Clicking on any of the County Links opens a brief listing of cities in within that counties boundary.

BUSINESS ADDRESS ENTRY

Enter your Business Street Address here.

If your business is located in Arizona, be sure to select the county from the list in the County drop down menu. If your business is located out of state select Not Applicable from the County drop down menu.

In the Country field you may type the initials of the country or type it completely; i.e. USA, United States

If the Remit To and Purchase Order address is the same as the Main, place a checkmark in the box beneath its title. If the addresses are different than the Main, type the full address for each.

NOTE:

Selecting Same As for either additional address will not be immediately apparent. During the registration process the screen refreshes at various points. The address information will load at one of those points.

COMMODITY CODE SEARCH AND REGISTRATION

Background
Information

- The proper registration of Commodity and Service Codes is extremely important. It is through the commodity codes that suppliers are directly notified of pending solicitations. If you use any incorrect or inappropriate codes you will either not be notified at all or you will be notified of a solicitation that mayl not be appropriate to your business.

- You may visit the "Solicitation" site as often as you like to view "All Solicitation". If you find a solicitation for a commodity code that you are not presently registered for you may still download and submit that solicitation. You may also register for as many commodity codes as you need.

Looking for a Commodity Code?

There are various means at your disposal for searching for the appropriate codes**.** It is always best to use an asterisk * as a wildcard in your searches. You will notice on the following screens that it is always used. It is not necessary, but it does enable you to be aware of further codes available that you might not otherwise have considered.

Search Option #1
You may Click on ADD and the entire list will open in a separate window. Codes are viewable by scrolling down the list and using the "Next Document" or "Previous Document" links at the bottom of each screen.

Search Option #2
You may type a known code. For example: 0070-0010, then click on Search. Select it by placing a checkmark in the box to its left, then click OK.

Search Option #3
Or you may do a partial code search. Example: 0070*, the results of which will include any codes with 0070 included, whether they be the Commodity Code Class or Sub-class.
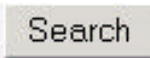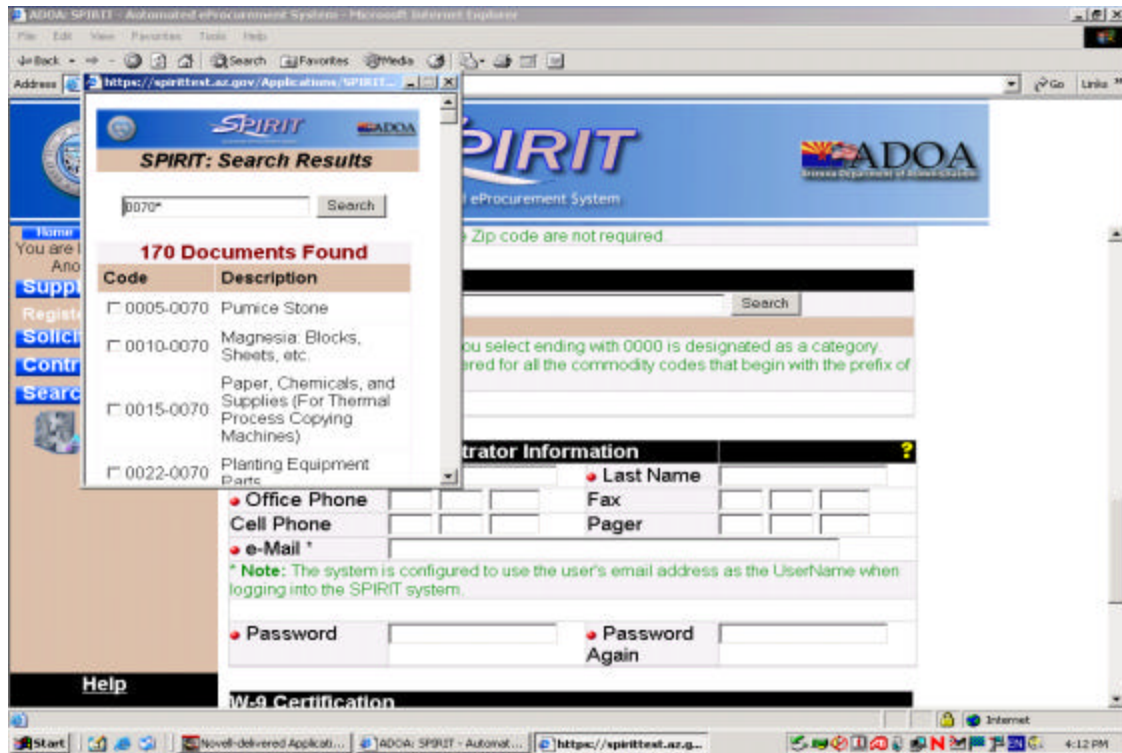
Search Option #4

If you are familiar with a Commodity Class you may then narrow the search by typing: 0070-*. The results for this search will show the Subclasses available under the Commodity Class of 0070.

Search Option #5

Or, you may type a partial description. For example: Comp* The search results will include all codes with the criteria included. Just place a check in the box to the left of the desired code(s) then click OK at the bottom of the window.

THE FOLLOWING IS A PARTIAL CODE SEARCH.

Type the numbers 0070* and Click on [Search]


The Search Results screen will open with Commodity and Service codes that contain your search criteria.
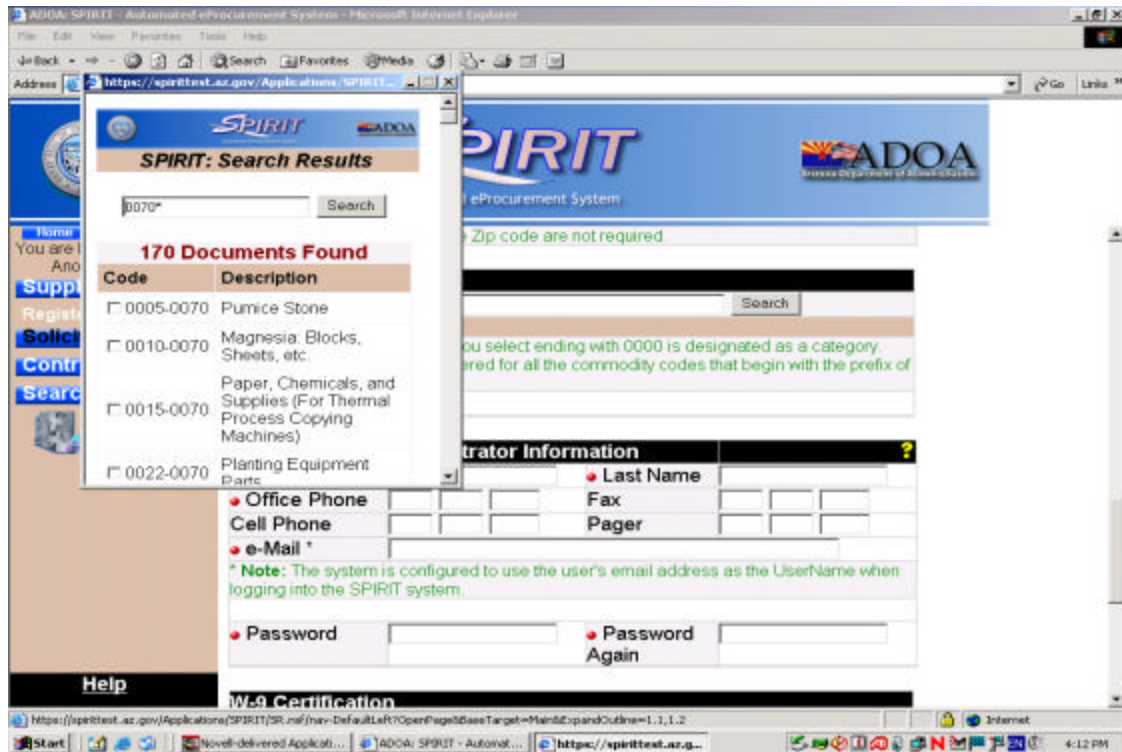
You searched by 0070*. This resulted in all codes with the numbers 0070 in them, regardless of whether the 0070 led or followed.

Had you wanted to search by the Commodity Class of 0070 your criteria would need to be typed list this: 0070-* The dash after the zero tells the search engine your are searching for any codes that begin with 0070-. The Search engine then looks for 0070- and returns 0070 with all it's subclasses.
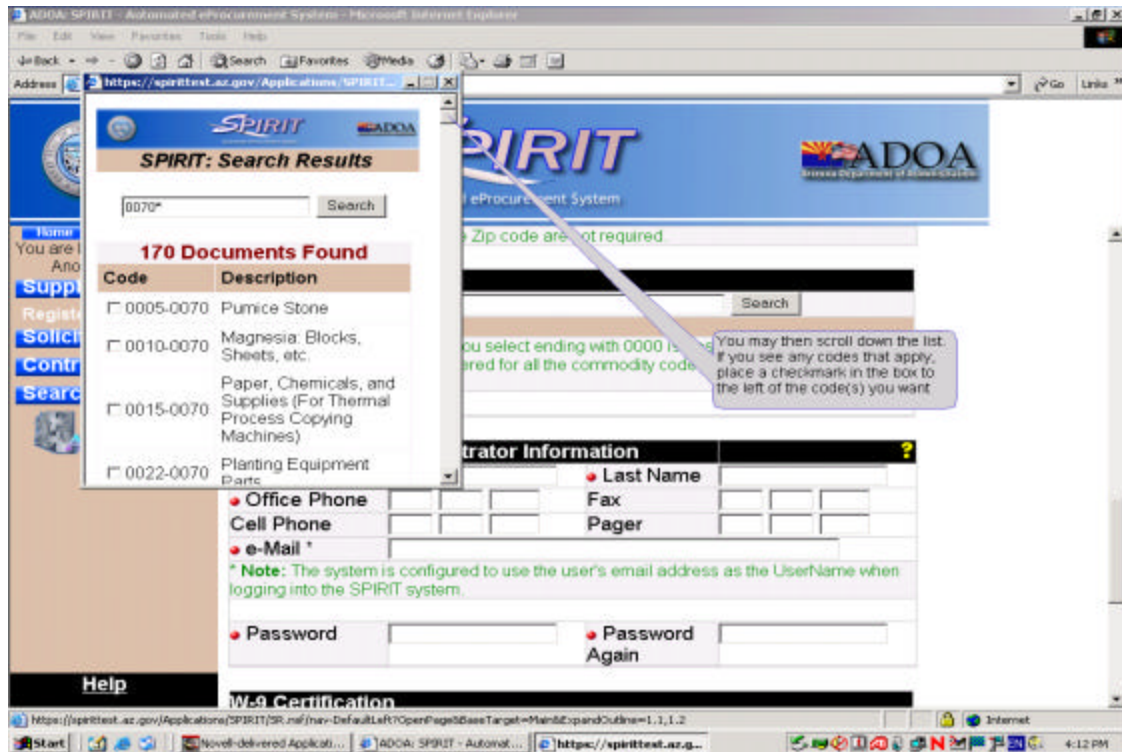
In the search results window you may then scroll down the list. If you see any
codes that apply, place a checkmark in the box to the left of the code(s) you want.
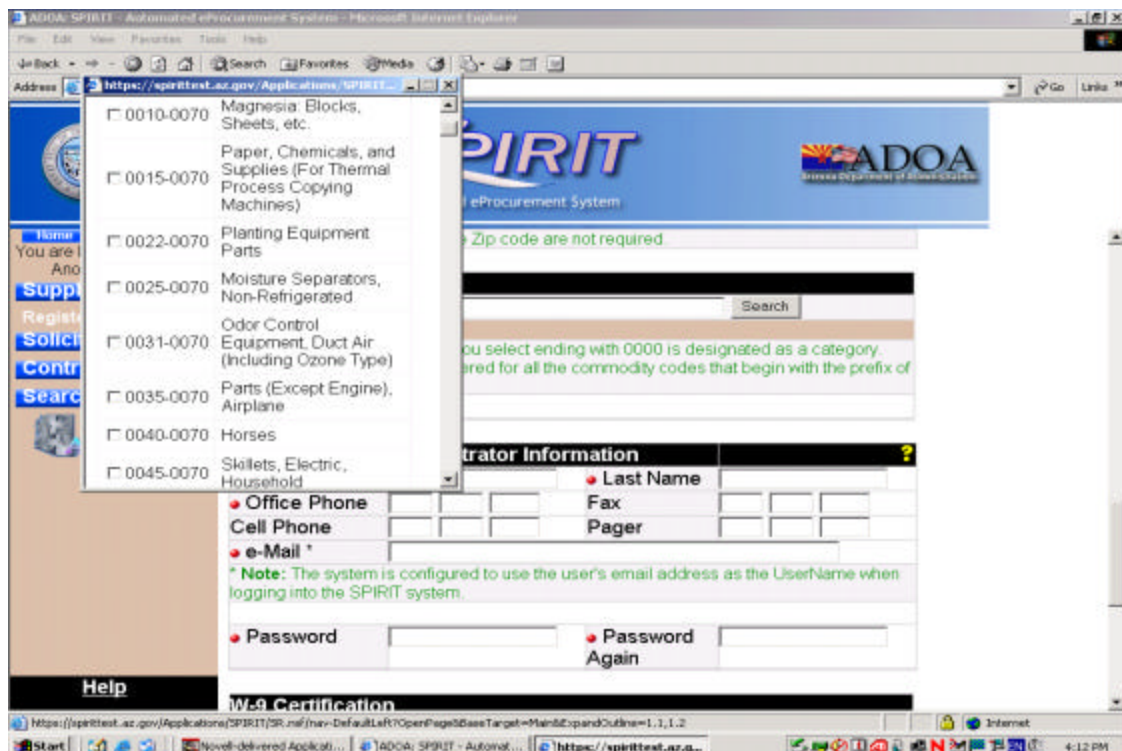
Note the code structure: 0070 is the Commodity Class or the high level description.

-0000 is the Sub-Class number set, which defines the commodity further. In this instance though 0070-0000 defines the entire 0070 code set.

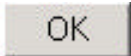**Placing a checkmark in 0070-0000 would have the effect of registering your company for the entire Commodity Class of 0070.**

Let's consider Ambulances and Rescue Vehicles. 0070 is the high level description of Automotive Vehicles and -0003 brings it down further, defining it by type as in Ambulances and Rescue Vehicles.

If 0070-0003 is something your company offers, place a checkmark in the box to its left. You could also have searched by vehicle, Ambulance, Rescue or any other various search criteria.

Perhaps Bookmobiles is something your company offers. Select that as well. Be aware that there is no limit as to the number of codes you may register under.

Once you have made the selections on a screen scroll down to the bottom of the screen and click OK. Your selections will be registered.

Note: Some search results may be so lengthy that you are required to click on the Next or Previous link at the bottom of the search results window to continue on through the list. If this is the case, do so, however, be aware that any selections you made in a search results screen will only be registered in your supplier profile if you click OK.

Click on [OK] when you have made the code selection(s) on the screen to load them into your company's profile.

The codes selected with checkmarks are now registered.

SEARCHES DONE BY A WRITTEN DESCRIPTION

Doing a search by word description will yield results used in a commodity/service code description.

NOTE

Remember to use the asterisk * as a wildcard in any searches you do.

For example, type in Scooter* in the search window and click on the [Search] button.

Note

> This search result includes: 0070 Automotive...

> with a Sub-Class of -0018 Motor Scooters...

If you do deal in the automotive area, this commodity area would be a good *start.* Notice that start was italicized. It is imperative during the initial and subsequent registration of commodity/service codes that you cover all the bases and register those codes that meet your company's offering regardless of how vaguely they may resemble them.

As done before with the search by code make your selection(s) from the list as appropriate

Scroll down to the bottom of the window

And Click on the [OK] button to register your selection(s).

The Codes selected are now included in your list of Commodity Codes.

REMOVING COMMODITY CODES

If you want to remove any of the codes you registered, simply click on the Remove button. A window like the code search window listing the codes you registered will open. Place a checkmark in the box to the left of the code(s) you wish to remove, scroll to the bottom, and then click [OK].

You are encouraged to review your supplier registration information often and make any necessary revisions.

Initial Supplier Administrator Information

Initial Supplier Administrator Information

The representative of your company that initially registers will effectively hold the role of System Administrator for your company in the SPIRIT database. They will have the role for administration, editing user profiles, and submitting proposals. Adding additional users is only possible once the initial registration has been submitted.

Your company's SPIRIT System Administrator will be able to set the roles for each additional contact registered, up to and including administration, editing their own profile and submitting proposals.

The Administration Role includes the rights to: change Company Addresses, Add/Delete Commodity or Service Codes, change Business Type/Organizational Structure, and Service Delivery Area.

The Edit Profile Role includes the rights to manage a users own profile contact information.

The Submit Proposal Role includes the rights to submit an offer or bid on behalf of your company. Any and all contacts given this role will have the ability to submit responses to solicitations, so you will want to insure that your final submission is agreed upon.

Enter your first name and last name
Enter **your** office phone number and not that of the main office
Enter your fax number
Enter your cell phone number
Enter your pages number
Enter your e-mail address

<u>REMEMBER THAT YOUR E-MAIL ADDRESS IS YOUR USER LOGIN NAME FOR ACCESS TO SPIRIT</u>.

Enter a password; this can be any combination of letters and numerals with a minimum of six characters.

In order to complete the supplier registration process you will need to read and

acknowledge the "W-9 Certification" by clicking on the Checkbox [ ] .

If the registration is complete, click on Submit. The Spirit System will let you know
if you have missed any information that is mandatory.

ADDING New Users

Once your registration is complete you may log in to SPIRIT for management of your Company Profile.

You will likely want others from your company to access SPIRIT. Once logged in, click on the **Profile** tab. From the sub-menu select **Create User** . On the screen that opens enter the appropriate user information.

Remember when selecting user rights that:

>The **Administration** Role includes the rights to: change Company Addresses, Add/Delete Commodity or Service Codes, change Business Type/Organizational Structure, and Service Delivery Area.

>The **Edit Profile** Role includes the rights to manage a users own profile contact information.

>The **Submit Proposal** Role includes the rights to submit an offer or bid on behalf of your company. Any and all contacts given this role will have the ability to submit responses to solicitations, so you will want to insure that your final submission is agreed upon.

Deactivating a User

If for some reason a SPIRIT user within your company should no longer be allowed to access to SPIRIT on behalf of your company; you may edit their User Profile to change their status from Active to Inactive.